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GPO Member Guide)

Rep. Patrick T. McHenry (R-NC)

House · Republican (most recent term) · NC-10 · in Congress 2005–2025 ·
Bioguide ID M001156

Party history: R 2005–2025. Source: term data in unitedstates/congress-legislators (CC0);
party shown is as recorded per term there.

Estimated net worth (from public disclosures)

Estimate	Report year	Low	Mid	High
(a) Estimated net worth at the earliest available report (2013); the member entered office earlier, in 2005	2013	–\$827,986	– \$198,495	\$430,996
(b) Latest net worth estimate	2023	– \$5,064,988	– \$2,444,496	\$175,997
(c) Estimated gain / loss, nominal dollars, 2013 → 2023 (10 years spanned)	2013– 2023	– \$5,495,984	– \$2,246,000	+ \$1,003,983

Gain Low = latest Low – earliest High; Gain High = latest High – earliest Low (widest possible spread); Mid = latest Mid – earliest Mid.

Reliability flags (net worth): none for these two endpoints. **Included in the recommended dollar-gain ranking.**

Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low ... High	Status / flags
2013	\$701,507	\$900,002	– \$198,495	–\$827,986 ... \$430,996	computed
2014	\$727,508	\$857,502	– \$129,994	–\$755,985 ... \$495,996	computed
2015	\$852,008	\$857,502	– \$5,494	–\$691,985 ... \$680,996	computed
2016	\$695,007	\$857,502	– \$162,495	–\$770,986 ... \$445,996	computed
2017	\$728,008	\$782,502	– \$54,494	–\$655,984 ... \$546,997	computed

2018	\$777,508	\$762,501	\$15,006	-\$606,985 ... \$636,998	computed
2019	\$753,008	\$762,501	-\$9,494	-\$620,985 ... \$601,998	computed
2020	\$827,508	\$750,001	\$77,506	-\$555,985 ... \$710,998	computed
2021	\$1,195,007	\$3,750,002	-\$2,554,994	-\$5,270,986 ... \$160,997	computed
2022	\$1,088,006	\$53,375,001	-\$52,286,994	-\$54,835,987 ... -\$49,738,002	computed; 1 open-ended liability value(s) counted at the lower bound (understates liabilities)
2023	\$1,105,506	\$3,550,002	\$2,444,496	-\$5,064,988 ... \$175,997	computed

- **What this is:** Net worth = Schedule A assets (each value range at its midpoint; low–high range shown) minus Schedule D liabilities (midpoints / ranges). **Low** = assets at range floors minus liabilities at range ceilings; **Mid** = midpoints; **High** = assets at ceilings minus liabilities at floors. Low and High are outer bounds of the reported ranges, not likely outcomes.
- **What it excludes / understates:** exact values (only ranges are reported); a **personal residence is not reported as an asset** (although a mortgage on it may be listed as a liability, which then lowers the estimate); retirement and federal accounts (e.g. Thrift Savings Plan, defined-benefit pensions) are only partly or not reported; assets of excepted/blind trusts, cash held below reporting thresholds, vehicles, household goods and most spouse/dependent items exempt from reporting are not included; liabilities on a personal residence, revolving credit under thresholds and loans to family may be omitted by filers.
- **Open-ended top ranges** (e.g. "Over \$50,000,000") are counted at their **lower bound** and flagged, so such values are understated.
- The change is a change in **estimated net worth in nominal dollars** (no inflation adjustment). It includes salary, gifts, inheritances, business income and re-valuation as well as investment results, and it is subject to range-bracket noise; it is **not** an investment return and implies nothing about conduct.

Read this first. Members report asset values only as *ranges* (e.g. "\$15,001 – \$50,000"), never exact dollars. Every figure below is an **estimate** computed from range midpoints, not a measured return. Figures cannot be interpreted as investment performance, and they do not show wrongdoing or skill. Methodology and limitations are at the end and in the project README. Sources: public financial disclosure reports filed with the Clerk of the U.S. House of Representatives and/or the Secretary of the Senate (Senate eFD), linked below.

AVG. ANNUAL
CHANGE
(GEOMETRIC, EST.)
+4.4%

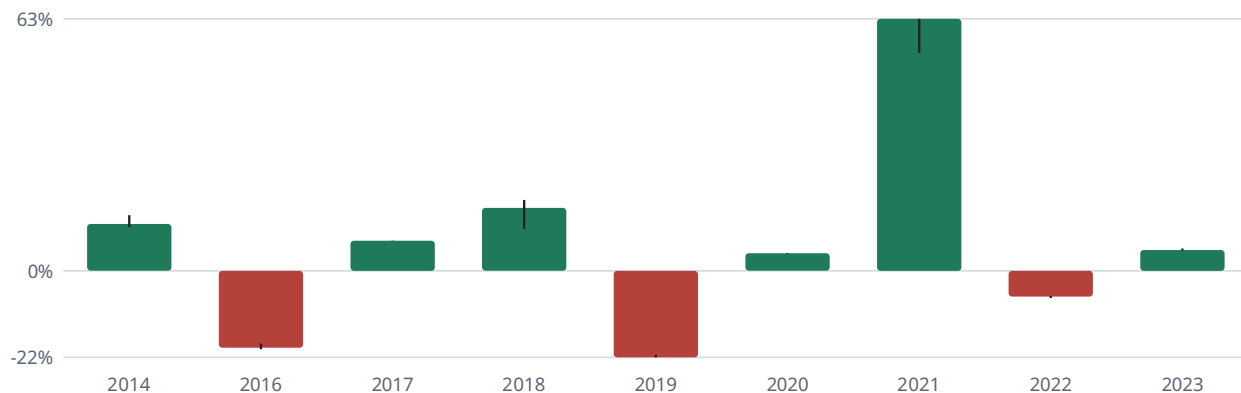
SIMPLE AVERAGE OF
YEARS
+6.7%

YEARS ESTIMATED
9

BEST / WORST
SINGLE YEAR
2021 +63%
2019 -22%

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +5.5% to +4.0%. This band is narrow because it moves both years together; the true uncertainty is larger — see the per-year “strict envelope” column and the limitations.

Estimated year-over-year change



Bars: midpoint estimate; whisker: same-position floor/ceiling band. Axis clipped to -100%...+150%. Years with insufficient traceable holdings are omitted.

Year (t-1 → t)	Opening value (mid)	Closing value (mid)	Income (mid)	Buys (mid)	Sales (mid)	Est. gain	Same-position band	Strict envelope	Traced coverage	Status / flags
2013→2014	\$701,507	\$719,507	\$64,454	\$0	\$0	+11.8%	+11.0% ... +14.0%	-87% ... +110%	100%	counted
2014→2015	\$189,004	\$388,504	\$2,452	\$24,002	\$0	+94.2%	+86.7% ... +115.7%	-60% ... +249%	26%	excluded; not eligible: traced coverage 26% < 60%
2015→2016	\$677,007	\$520,006	\$26,203	\$0	\$0	-19.3%	-19.7% ... -18.2%	-104% ... +65%	79%	counted
2016→2017	\$612,006	\$604,006	\$54,352	\$0	\$0	+7.6%	+7.6% ... +7.6%	-89% ... +104%	88%	counted
2017→2018	\$712,007	\$761,506	\$54,953	\$0	\$8,000	+15.8%	+10.5% ... +17.8%	-84% ... +116%	98%	counted
2018→2019	\$704,506	\$529,506	\$21,852	\$0	\$0	-21.7%	-23.6% ... -21.1%	-106% ... +62%	91%	counted

2019→2020	\$712,506	\$712,006	\$31,852	\$0	\$0	+4.4%	+4.2% ... +4.5%	-92% ... +100%	95%	counted
2020→2021	\$679,506	\$1,079,506	\$30,102	\$0	\$0	+63.3%	+54.7% ... +86.8%	-47% ... +173%	82%	counted
2021→2022	\$1,187,006	\$1,080,006	\$30,202	\$0	\$0	-6.5%	-6.9% ... -6.3%	-82% ... +69%	99%	counted
2022→2023	\$1,064,005	\$1,089,505	\$30,202	\$0	\$0	+5.2%	+5.1% ... +5.6%	-72% ... +83%	98%	counted

Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is $\geq 40\%$ of the largest). Electronic (text) PDFs are parsed. Scanned/image-only filings are OCR-read and used **only** if they pass the explicit validation gates described in the project README (value/income coverage, two-engine agreement, exact bracket snapping, page completeness, year-to-year position continuity); such years are labelled **OCR-derived** below. Scanned filings that fail validation are listed as “insufficient data – scanned”.

Report year	Doc ID	Type	Filed	Schedule A rows	Rows with unparsed value	Source (official filing) / SHA-256
2013	10003958	House amendment	8/6/2014	14	0	10003958.pdf f15c9902b63b76f158a919fa2752c4a1d916b3c8762506f971d1593025591f97
2014	10006353	House annual	5/14/2015	15	0	10006353.pdf 6ec749f6acf2330c6b989e08f281cd2d0382c386336ab8288e59b0935f68f4bf
2015	10011355	House annual	5/13/2016	15	0	10011355.pdf 9ba733fb5575261f4073dbf48b44ddaf707473ce983c0c740de51ec44ea96978
2016	10016782	House annual	5/12/2017	15	0	10016782.pdf 8c8b967d192eca6eff3fdc9fc55eec74dc2f363cde7c19014c619538879d13bc
2017	10023085	House annual	5/15/2018	17	0	10023085.pdf d6af3b89b7f7cd79302a196a08dc6bdf4b7742a5e0e4a96028ee6e503ba1f39a

2018	10026969	House annual	5/15/2019	16	0	10026969.pdf 2f980f93df729f6a593a400f a598e484151ffbb41b2092819 71fcf35a936f236
2019	10054551	House amendment	5/16/2023	17	0	10054551.pdf 1461c72c99083578ca33da25 b870ee5e9fe8c6921c01cd416 704fa13d99a4006
2020	10041742	House amendment	7/29/2021	16	0	10041742.pdf 186da4be06ad3903f105f43c9 05957bb4bcc4eef6a078ef47 b10708172d95a99
2021	10047769	House annual	5/16/2022	14	0	10047769.pdf 40983b2d07e2e73b6c4febd70 75dedf8c92ba25ebf1103273 d6d55b726ea7278
2022	10061186	House amendment	5/14/2024	14	0	10061186.pdf e268b9505403af3f698a7b7a7 898d5b7598b5693d161fe2af0 e2d90b43aa3756
2023	10060043	House annual	5/15/2024	14	0	10060043.pdf f13a9df3c04a790ed9ecfe3e e1611c6bccda01710795b8e77 5249918d68e5622

Largest movers 2020→2021

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 (VITVX) [MF]	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P]	DC	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Marsh & McLennan Companies, Inc. (MMC) [ST]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
GW & Wade Asset Managment ⇒ Franklin Utilities Class A [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
McHenry-McHenry partnership ⇒ Mortgage Held on 215 Robinson Road [DO]	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0

Alliance Bank and Trust [PS]	—	held	\$1 - \$1,000	\$1 - \$1,000	\$0	\$0
McHenry-Putman Partnership [RP]	—	held	\$15,001 - \$50,000; \$15,001 - \$50,000	\$15,001 - \$50,000; \$15,001 - \$50,000	\$0	\$0
Locust -Hwy 200 LLC [RP]	—	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$0	\$0

Largest movers 2021→2022

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Congressional FCU Money Market Account [BA]	—	held	\$50,001 - \$100,000	\$1 - \$1,000	\$0	\$0
Brattle Group Retirement Plan ⇒ Vanguard Total Bond Market Index Investor Shares (VBMFX) [	SP	held	\$15,001 - \$50,000	None	\$0	\$0
Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 (VITVX) [MF]	SP	held	\$250,001 - \$500,000	\$250,001 - \$500,000	\$0	\$0
Marsh & McLennan Companies, Inc. (MMC) [ST]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
GW & Wade Asset Managment ⇒ Franklin Utilities Class A [MF]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P]	DC	held	\$250,001 - \$500,000	\$250,001 - \$500,000	\$0	\$0
McHenry-McHenry partnership ⇒ Mortgage Held on 215 Robinson Road [DO]	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Alliance Bank and Trust [PS]	—	held	\$1 - \$1,000	\$1 - \$1,000	\$0	\$0

Largest movers 2022→2023

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
McHenry-Putman Partnership [RP]	—	held	\$15,001 - \$50,000; \$15,001 - \$50,000	\$15,001 - \$50,000; \$50,001 - \$100,000	\$0	\$0
Congressional FCU checking [BA]	—	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
Congressional FCU Money Market Account [BA]	—	held	\$1 - \$1,000	\$1,001 - \$15,000	\$0	\$0

Brattle Group Retirement Plan ⇒ Vanguard Target Retirement 2045 (VITVX) [MF]	SP	held	\$250,001 - \$500,000	\$250,001 - \$500,000	\$0	\$0
Marsh & McLennan Companies, Inc. (MMC) [ST]	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
Vanguard 529 College Savings Plan ⇒ Vanguard 529 College Savings Plan [5P]	DC	held	\$250,001 - \$500,000	\$250,001 - \$500,000	\$0	\$0
McHenry-McHenry partnership ⇒ Mortgage Held on 215 Robinson Road [DO]	—	held	\$100,001 - \$250,000	\$100,001 - \$250,000	\$0	\$0
Alliance Bank and Trust [PS]	—	held	\$1 - \$1,000	\$1 - \$1,000	\$0	\$0

Method (summary)

1. Schedule A asset rows are read from each annual report; the dollar range for each row is converted to its midpoint. Open-ended top ranges ("Over \$50,000,000") are excluded from the traced set and counted as a coverage loss.
2. Positions are matched year to year by owner code (self/SP/DC/JT) + normalised asset name. A position that appears only in year t is included only if Schedule B shows a purchase of it in year t (opening value 0); a position that disappears is included only if Schedule B shows a sale (closing value 0). Otherwise it is excluded as unexplained.
3. Estimated gain = (closing – opening + reported income – purchases + sale proceeds) ÷ opening, all at midpoints, for the traced positions. "Capital gains" income is not added again (it is already in value change and sale proceeds).
4. A year counts only if traced opening value ≥ \$50,000 and traced coverage ≥ 60% of the opening midpoint. A member is ranked only with ≥ 3 such years (exactly 2 = "limited data", shown but unranked). Average = geometric mean of (1+yearly estimate).

Limitations

- Ranges are wide (up to a factor of 5 or more, and up to \$50M+ open-ended); a holding can move between ranges without any real change in value, and stay in a range while moving materially. Yearly estimates are therefore noisy; the "strict envelope" shows the mathematical worst/best case and is typically wider than ±100%.
- Purchases and sales are only disclosed as ranges and only for transactions over \$1,000; partial sales, dividend reinvestment, spousal/dependent accounts and retirement-plan funds are reported inconsistently. Excepted/ blind trusts, personal residences and certain pensions are not reported at all.
- Filers sometimes change how they list assets (e.g. listing a brokerage account vs. its individual holdings), which can make positions untraceable across years; these are excluded rather than guessed.
- Asset values in an annual report are as of Dec 31 of the reporting year; the report year t–1→t covers that calendar year. Late or amended filings are used when filed; extensions can delay them.
- The text of these reports is machine-parsed from PDFs; parse errors are possible. Every number links back to the cited filing. This is not investment advice.
- Use of these filings is restricted by 5 U.S.C. § 105(c) (no unlawful, commercial or credit-rating purpose, and none for solicitation of money).

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Figures are estimates derived from value ranges reported in public financial disclosures; they are not exact values and are not financial advice.